

#107 Digitizing the Process: Development of a Digital Academic Requirements Committee Petition - Project Artifacts

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List of Artifacts

- [Academic Requirements Committee Petition Webpage](#)
- Screenshots of the petition (attached; below)
- Full copy of the Memorandum of Understanding (attached; below)
- Full copy of the Assessment Plan (attached; below)
- Full copy of the OnBase ARC Petition User Manual (attached; below)
- Full copy of the OnBase ARC Petition Workflow (attached; below)

Student View of the Petition:

Academic Requirements Committee Petition Form

PSU ID *

Your student information was not able to be drawn from Banner. Please contact the USS Helpdesk at 503-725-HELP(4357) or help@pdx.edu for further assistance.

Last Name *

First Name *

Middle Name

E-mail *

Day Phone

First Major

Second Major

Advisor

Catalog Year

Degree

 ▼

Proposed Graduation

Term

 ▼

Year

 ▼

Please review your major above. If it is correct, check the box below to proceed. If the listed major is not correct you need to change your major in Banner (<https://banweb.pdx.edu/>) before submitting your petition.

☒ My major is correct.

Attach Supporting Documentation Here (Current DARS is required)

Supporting Documentation for ARC Petition *

Attach Supporting Documentation for ARC Petition...

Attached files must be a pdf or image (jpg, jpeg, tiff, png, bmp, gif) file type.

1. This petition is in regard to (check ONE box only; you must petition separately for each item)

☐ Freshman Inquiry *

☐ Sophomore Inquiry *

☐ Upper Division Cluster *

☐ Senior Capstone *

☐ Other *

Examples: BA/BS Requirements, Pass/No Pass Limit, Writing Requirement, Credit Overload, Credits in Residence

2. Brief Statement of action requested of the Committee.

Please describe the specific action you want the committee to consider. *

3. Justification of Request

Justification of Request. Please explain in a clear concise manner why you should be exempted from the usual requirements. (e.g., if petitioning catalog year, what would be different for you in the requested catalog?) You must provide documentation for all claims made in this section.

Enter justification below *

Submit

Review View of the Petition:

DEG ARC Petition Unity Form for BRODERICK FRANKLIN, 921930209, submitted 11/12/2014 - Internet Explorer

OnBase

Documents: DEG - ARC Petition Processing ARC - FRHQ Review
 Move messages to: GroupWise Integration version 1.0 Store body with header information

ID (1)	Current First Name	Current Last Name	ARC Petition Status
921930209	BRODERICK	FRANKLIN	ADVISOR/COORDINATOR REVIEW

Life Cycle View Work Folder

Combined Inbox

- DEG - ARC Petition Processing
 - ARC - (SYS) Initial
 - ARC - Review
 - ARC - FRHQ Review
 - ARC - FRHQ Review
 - ARC - Senior Capstone
 - ARC - UNST Review
 - ARC - UNST Needs Rerouting
 - ARC - Clust: American Studies
 - ARC - Clust: Community Studies
 - ARC - Clust: Design, Innovation, and Entrepreneurs
 - ARC - Clust: Student Innovation

Continue in ARC Process May Be Resolved Outside of ARC Process Reroute this petition Request Additional Review Issue Cannot Be Petitioned Populate Student Data

3. Justification of Request

Justification of Request. Please explain in a clear concise manner why you should be exempted from the usual requirements. (e.g., if petitioning catalog year, what would be different for you in the requested catalog?) You must provide documentation for all claims made in this section.

Enter justification below

0 Note(s)

4. Advisor or Coordinator Statement

This statement is advisory and is not binding on the Committee's decision.

Enter your email here to get an email notification when the petition is resolved (Optional)

0 Note(s)

ARC Committee View of the Petition:

DEG ARC Petition Unity Form for BRODERICK FRANKLIN, 921930209, submitted 11/12/2014 - Internet Explorer

OnBase

Documents: DEG - ARC Petition Processing ARC - Committee Members Preliminary Review
 Move messages to: GroupWise Integration version 1.0 Store body with header information

ID (1)	Current Last Name	Current First Name	ARC Petition ARC Committee...
921930209	FRANKLIN	BRODERICK	

Life Cycle View Work Folder

Display Current form in larger viewer Yes (vote to approve) No (vote to deny) Unsure

Name Enter your email here to get an email notification when the petition is resolved (Optional)

5. University Studies Review

6. Degree Requirements

Reason for this request

7. ARC Committee Review

Selecting the "Save Comments" button only saves any notes you added to the form. It does not record your decision about the petition, to do that use the OnBase Workflow Buttons.

Save Comments

0 Note(s)



Memorandum of Understanding Office of Information Technology

Academic Requirements Committee (ARC) Petition Support Plan

I. Summary

This agreement is entered into by the Office of Information Technology (OIT) Enterprise Applications (EA), the Registrar's Office (RO) and University Studies (UNST).

This memorandum of understanding (MOU) identifies the participating Portland State University (PSU) offices and clarifies areas of responsibility with regard to technology support for the OnBase ARC Petition solution.

Any changes to this MOU, as recommended or requested by the initial or future collaborators, will be shared with representation from associated offices for approval.

II. Roles and Responsibilities

Enterprise Applications (EA)

EA is the primary owner of the OnBase system and will provide technical support related to the ARC petition.

Responsibilities:

- Make small changes as needed
 - Changes to form text, dropdowns, queue names, etc.
- Enhancements or changes to the workflow
 - Will be seen as a new project and will be entered into OIT's project request queue
- Emergency fixes as needed
- Maintain technical documentation

Registrar's Office (RO)

RO will be the primary owners of the ARC petition process. The Degree Certification Specialist will be

the primary resource within RO for basic user support, issues with petitions that have been misrouted, as well as other workflow process related issues that may arise.

Responsibilities:

- Support to end users (faculty and staff)
- Reroute petitions as needed
- Authorize access to workflow
 - RO will approve access, OIT will assign
 - RO will email oit-imaging@pdx.edu to request assignment or removal of access
- Escalate issues to OIT
 - Answer and forward emails sent to ARC support email (ARC-PetitionSupport-group@pdx.edu)
- Maintain end user documentation

University Studies (UNST)

UNST receives a large number of ARC petitions. They appointed a workflow coordinator within UNST who is responsible for routing petitions as needed and assigning petitions to the appropriate cluster coordinators.

Responsibilities:

- Support end users within UNST
- Reroute petitions as needed
- Assign petitions to cluster coordinators
- Escalate issues to OIT

III. Service Description and Service Levels

Service Description

Uptime

- System will be available all hours of the day (excluding maintenance windows). No tech support until Standard Operating Hours.
- Standard Operating Hours: 8:00 AM - 5:00 PM PST/PDT (Mon-Fri, excluding University holidays/closures)

Maintenance Window

- We have a weekly maintenance window on Fridays from 8:00 PM to 11:00 PM. Maintenance only occurs if needed.
- Changes that require outages or other service interruptions will be submitted to OIT's change control and then will be scheduled with and announced to OIT-DocImaging-Admins-Group@pdx.edu.
- OnBase and Banner downtime do not always align. If Banner is down, the student will not be able to submit the form.

Backup and Recovery

- Application backup occurs nightly and copies will be preserved for a minimum of 30

days.

- If a server failure occurs in which a restore from server backup is required, a full service recovery may require up to one week.

Supported Operating Systems and Browsers

- OIT will make every effort to support users on all platforms. However, solution development and testing will be aligned with the [OIT Standard Desktop Configuration for Enterprise Applications](#) policy.

Service Levels

Tier 1

- Support is first point of contact for end users. Users will email ARC-PetitionSupport-group@pdx.edu if they are having issues with the ARC petition workflow. The Degree Certification Specialist is the contact within RO who will respond or route issues to other tiers.

Tier 2

- Support receives issues escalated by Tier 1 assigned via email. Tier 2 is the ARC Petition Workflow Coordinator within UNST. Some users may contact Tier 2 support directly if they know the resource.

Tier 3

- Support receives issues escalated by Tier 1 or 2, as appropriate. Tier 3 support may include User Support Services (USS) and/or Enterprise Applications (EA) within OIT. Tier 3 is responsible for resolving technical issues.

Change Schedule

Process Review

- Initial Evaluation will occur at the end of the 2014 Fall term. No major changes will be made at this time.
- In-depth Evaluation will occur at the end of the 2015 Spring term. Any enhancements will be made throughout Summer 2015.

IV. Signatures

To confirm your review and approval “sign” this document by entering your name next to your department and documenting the date.

PSU Department / Agency	Name	Date
Enterprise Applications	Greg Pitter	9/24/2014
Registrar's Office	Cindy Baccar	9/25/2014
University Studies	Yves Labissiere	9/24/14

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Assessment Plan

Purpose: Continuous process improvement

Assessment questions:

- How is the electronic petition process working for students?
- How is the electronic petition process working for the ARC committee?
- How is the electronic petition process working for reviewers?
- Has the electronic petition process increased efficiency in the petition process?

Method:

- Through utilization of the OnBase reporting tool, data will be collected and analyzed to assess the efficiency of the online ARC process.
 - Example: Timeframes
 - # of days being reviewed by a particular category/area
 - # of days from submission to approval
 - # of days from submission to implementation
 - # of days from approval to implementation
- Sample survey of users on functionality.

Reporting:

- Internal reporting within ARC and Degree Requirements
- Faculty Senate Report- Annual



Academic Requirements Committee Petition User Manual

[Overview](#)

[Parts of the OnBase User Interface](#)

[Web Client](#)

[Unity Client \(PCs only\)](#)

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[As a professional academic advisor in a College or School](#)

[As a UNST Coordinator \(FRINQ, SINQ, Capstone\)](#)

[FRINQ Coordinator](#)

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[As a UNST Junior Cluster Coordinator or Director](#)

[Cluster Coordinator](#)

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[If I get an email requesting feedback](#)

Overview

The Academic Requirements Committee (ARC) Petition had been a paper process until it was made available to students online for the Fall 2014 term. The request form and approval workflow were built within software called OnBase. OnBase is an enterprise application managed by the Office of Information Technology (OIT). To learn more about OnBase and how to use it for the ARC process, follow the instructions below.

Parts of the OnBase User Interface

The two primary ways to access OnBase are from the Web Client or the Unity Client. Most users will access OnBase from the Web Client.

Web Client

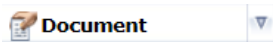
You may access OnBase from your web browser by using the OnBase Web Client. The Web Client can be used in Internet Explorer, Firefox, or Safari. Follow the steps below to access:

Accessing the Web Client:

1. Open one of the supported web browsers (Internet Explorer, Firefox, or Safari)
2. Go to the website imaging.pdx.edu
 - a. If you are using a computer that is off-campus, you will be asked to click the Confirm security exception button. (Your web browser will only have you do this the first time you log in.)
3. Enter your Odin Username and Odin Password then press Login

Accessing OnBase Workflow:

1. After logging in, click the down arrow next to the word "Document"



2. Select "Workflow" and a new window will appear
3. To process a petition, follow the steps specific to your role (outlined below).

Unity Client (Windows only)

The OnBase Unity Client is a Windows application for using OnBase. If you have not already installed the Unity Client, follow the installation steps below.

Installing the Unity Client:

1. Open your Start menu
2. Select All Programs
3. Select Self Service Software
4. From the list of available software, select the OnBase Unity Client
5. Select Run

If you do not see the OnBase Unity Client in this list, email help@pdx.edu.

Accessing OnBase Workflow:

1. To open the Unity Client, either click on the green OnBase icon  on your desktop, or go to Start, All Programs, Hyland and the Unity Client.
2. From the Home screen, select Workflow 
3. To process a petition, follow the steps specific to your role (outlined below).

How do I use OnBase...

As a professional academic advisor in a College or School

As an advisor, you should see a folder  labeled with your college or school name.

To review a petition:

1. Click on the folder to bring up a list of petitions
2. Click on the name of the petition you would like to review and it will appear in another pane
3. Scroll through the petition and add your statement in the appropriate box (it will be highlighted in red)
4. At the bottom of the petition, click “Save Comments”

To route a petition:

1. After reviewing the petition, adding your comments, and saving the form, use the row of buttons to route the petition. Your routing options include:
 - a. Continue in ARC Process 
 - i. This button routes the petition and your comments to the next step in [the process](#).
 - b. May Resolve outside of ARC Process 
 - i. Click this button when an ARC petition is not needed or is not appropriate. Examples of this include resolving the issue by submitting a DARS exception or when another petition process is more appropriate. An email will be sent to the student with your comments.
 - c. Reroute this petition 
 - i. If the petition has been routed to your school or college by mistake, click this button to reroute to another school or college for review. If the petition should be reviewed by University Studies (UNST), select the “Process Administrator” option.
 - d. Issue Cannot be Petitioned 
 - i. Use this button carefully. Click this button when the issue absolutely cannot be petitioned. The most common example of this is a student petitioning to graduate with 30 credit hours. An email will be sent to the student with your comments.
 - ii. If you are unsure whether the issue can or cannot be petitioned, do not use this option. Instead, add your comments and click the “Continue in ARC Process” button. ARC will determine if the issue is petitionable.
 - e. Request Additional Review 

- i. If you need someone else's feedback in addition to your own, use this button. This sends an email with a link to the petition to a recipient of your choice, asking for additional review. The petition will be sent to Degree Requirements once this step is complete.

As a UNST Coordinator (FRINQ, SING, Capstone)

FRINQ Coordinator

As a FRINQ Coordinator, you should see a red folder  called "ARC - FRINQ Review".

To review a petition:

1. Click on the folder to bring up a list of petitions
2. Click on the name of the petition you would like to review and it will appear in another pane
3. Scroll through the petition and add your statement in the appropriate box (it will be highlighted in red)
4. At the bottom of the petition, click "Save Comments"

To route a petition:

1. After reviewing the petition, adding your comments, and saving the form, use the row of buttons to route the petition. Your routing options include:
 - a. Continue in ARC Process 
 - i. This button routes the petition and your comments to the next step in [the process](#).
 - b. May Resolve outside of ARC Process 
 - i. Click this button when an ARC petition is not needed or is not appropriate. Examples of this include resolving the issue by submitting a DARS exception or when another petition process is more appropriate. An email will be sent to the student with your comments.
 - c. Reroute this petition 
 - i. If the petition has been routed to you by mistake, click this button to reroute to another area within UNST for review. If the petition should be reviewed by an academic department instead, select the "Process Administrator" option.
 - d. Issue Cannot be Petitioned 
 - i. Use this button carefully. Click this button when the issue absolutely cannot be petitioned. The most common example of this is a student

petitioning to graduate with 30 credit hours. An email will be sent to the student with your comments.

- ii. If you are unsure whether the issue can or cannot be petitioned, do not use this option. Instead, add your comments and click the “Continue in ARC Process” button. ARC will determine if the issue is petitionable.

e. Request Additional Review

- i. If you need someone else’s feedback in addition to your own, use this button. This sends an email with a link to the petition to a recipient of your choice, asking for additional review. The petition will be sent to Degree Requirements once this step is complete.

SINQ Coordinator

As a SINQ Coordinator, you should see a green folder  called “ARC - SINQ Review”.

To review a petition:

1. Click on the folder to bring up a list of petitions
2. Click on the name of the petition you would like to review and it will appear in another pane
3. Scroll through the petition and add your statement in the appropriate box (it will be highlighted in red)
4. At the bottom of the petition, click “Save Comments”

To route a petition:

1. After reviewing the petition, adding your comments, and saving the form, use the row of buttons to route the petition. Your routing options include:
 - a. Continue in ARC Process 
 - i. This button routes the petition and your comments to the next step in [the process](#).
 - b. May Resolve outside of ARC Process 
 - i. Click this button when an ARC petition is not needed or is not appropriate. Examples of this include resolving the issue by submitting a DARS exception or when another petition process is more appropriate. An email will be sent to the student with your comments.
 - c. Reroute this petition 
 - i. If the petition has been routed to you by mistake, click this button to reroute to another area within UNST for review. If the petition should be reviewed by an academic department instead, select the “Process Administrator” option.

- d. Send to Director of Clusters 
 - i. Use this option if the request is due to a “mismatch” between SING and Junior Cluster
- e. Issue Cannot be Petitioned 
 - i. Use this button carefully. Click this button when the issue absolutely cannot be petitioned. The most common example of this is a student petitioning to graduate with 30 credit hours. An email will be sent to the student with your comments.
 - ii. If you are unsure whether the issue can or cannot be petitioned, do not use this option. Instead, add your comments and click the “Continue in ARC Process” button. ARC will determine if the issue is petitionable.
- f. Request Additional Review 
 - i. If you need someone else’s feedback in addition to your own, use this button. This sends an email with a link to the petition to a recipient of your choice, asking for additional review. The petition will be sent to Degree Requirements once this step is complete.

Capstone Coordinator

As a Capstone Coordinator, you should see a gray folder  called “ARC - Senior Capstone”.

To review a petition:

1. Click on the folder to bring up a list of petitions
2. Click on the name of the petition you would like to review and it will appear in another pane
3. Scroll through the petition and add your statement in the appropriate box (it will be highlighted in red)
4. At the bottom of the petition, click “Save Comments”

To route a petition:

1. After reviewing the petition, adding your comments, and saving the form, use the row of buttons to route the petition. Your routing options include:
 - a. Continue in ARC Process 
 - i. This button routes the petition and your comments to the next step in [the process](#).
 - b. May Resolve outside of ARC Process 
 - i. Click this button when an ARC petition is not needed or is not appropriate. Examples of this include resolving the issue by submitting a

DARS exception or when another petition process is more appropriate. An email will be sent to the student with your comments.

- c. Reroute this petition 
 - i. If the petition has been routed to you by mistake, click this button to reroute to another area within UNST for review. If the petition should be reviewed by an academic department instead, select the “Process Administrator” option.
- d. Issue Cannot be Petitioned 
 - i. Use this button carefully. Click this button when the issue absolutely cannot be petitioned. The most common example of this is a student petitioning to graduate with 30 credit hours. An email will be sent to the student with your comments.
 - ii. If you are unsure whether the issue can or cannot be petitioned, do not use this option. Instead, add your comments and click the “Continue in ARC Process” button. ARC will determine if the issue is petitionable.
- e. Request Additional Review 
 - i. If you need someone else’s feedback in addition to your own, use this button. This sends an email with a link to the petition to a recipient of your choice, asking for additional review. The petition will be sent to Degree Requirements once this step is complete.

As a UNST Junior Cluster Coordinator or Director

Cluster Coordinator

As a Cluster Coordinator, you should see an icon  next to the folder with your cluster name.

To review a petition:

1. Click on the folder to bring up a list of petitions
2. Click on the name of the petition you would like to review and it will appear in another pane
3. Scroll through the petition and add your statement in the appropriate box (it will be highlighted in red)
4. At the bottom of the petition, click “Save Comments”

To route a petition:

1. After reviewing the petition, adding your comments, and saving the form, use the row of buttons to route the petition. Your routing options include:

- a. Send to Director of Clusters 
 - i. Routes the petition and your comments to the Director of Clusters
- b. May Resolve outside of ARC Process 
 - i. Click this button when an ARC petition is not needed or is not appropriate. Examples of this include resolving the issue by submitting a DARS exception or when another petition process is more appropriate. An email will be sent to the student with your comments.
- c. Issue Cannot be Petitioned 
 - i. Use this button carefully. Click this button when the issue absolutely cannot be petitioned. The most common example of this is a student petitioning to graduate with 30 credit hours. An email will be sent to the student with your comments.
 - ii. If you are unsure whether the issue can or cannot be petitioned, do not use this option. Instead, add your comments and click the “Continue in ARC Process” button. ARC will determine if the issue is petitionable.
- d. Request Additional Review 
 - i. If you need someone else’s feedback in addition to your own, use this button. This sends an email with a link to the petition to a recipient of your choice, asking for additional review. The petition will be sent to Degree Requirements once this step is complete.

Director of Clusters

As the Director of Clusters, you should see an icon like this  next to the folder called “ARC - Director of Clusters Review”.

To review a petition:

1. Click on the folder to bring up a list of petitions
2. Click on the name of the petition you would like to review and it will appear in another pane
3. Scroll through the petition and add your statement in the appropriate box (it will be highlighted in red)
4. At the bottom of the petition, click “Save Comments”

To route a petition:

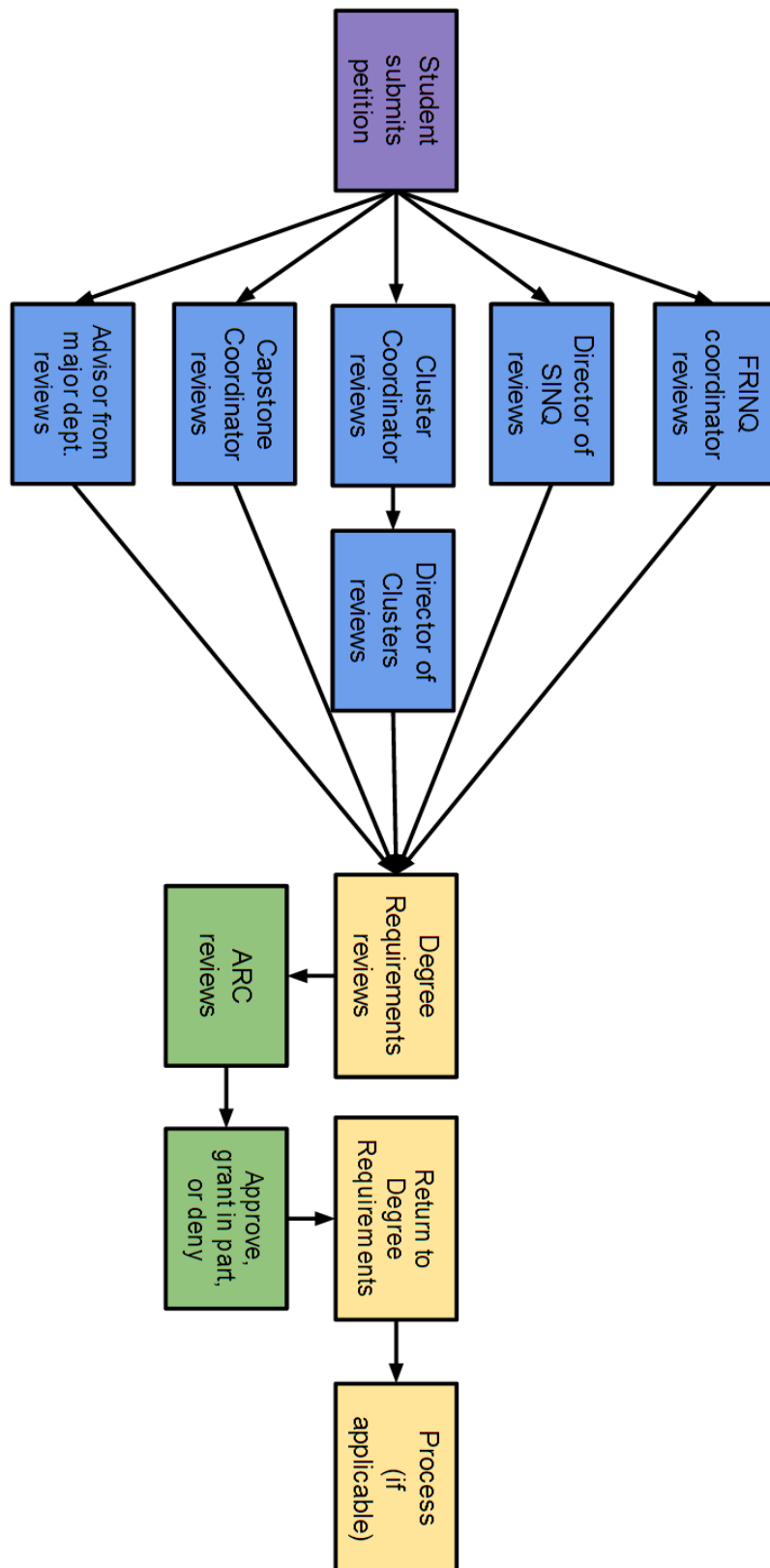
1. After reviewing the petition, adding your comments, and saving the form, use the row of buttons to route the petition. Your routing options include:
 - a. Continue in ARC Process 

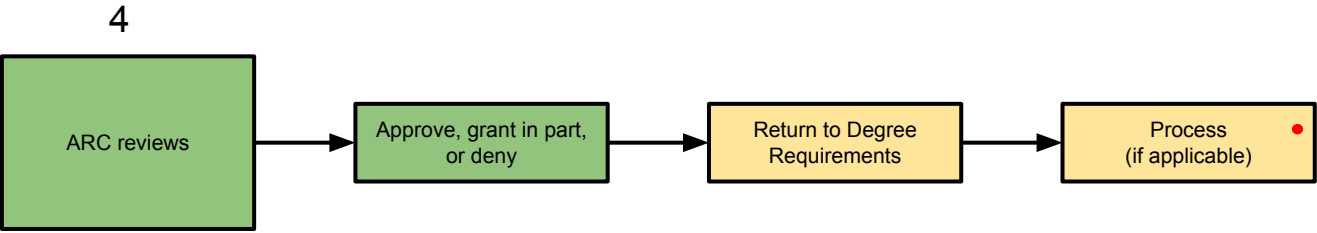
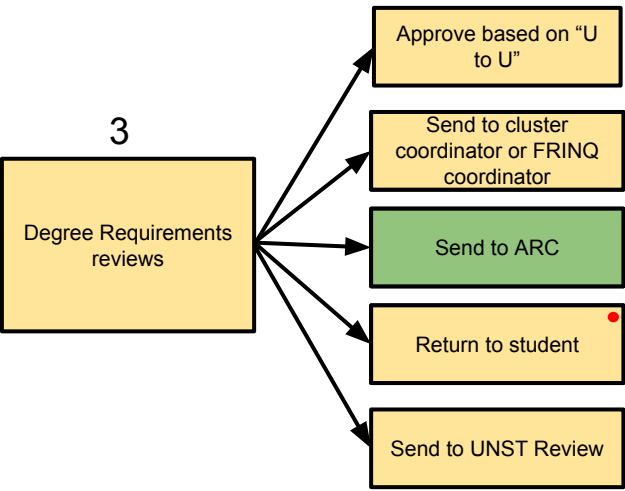
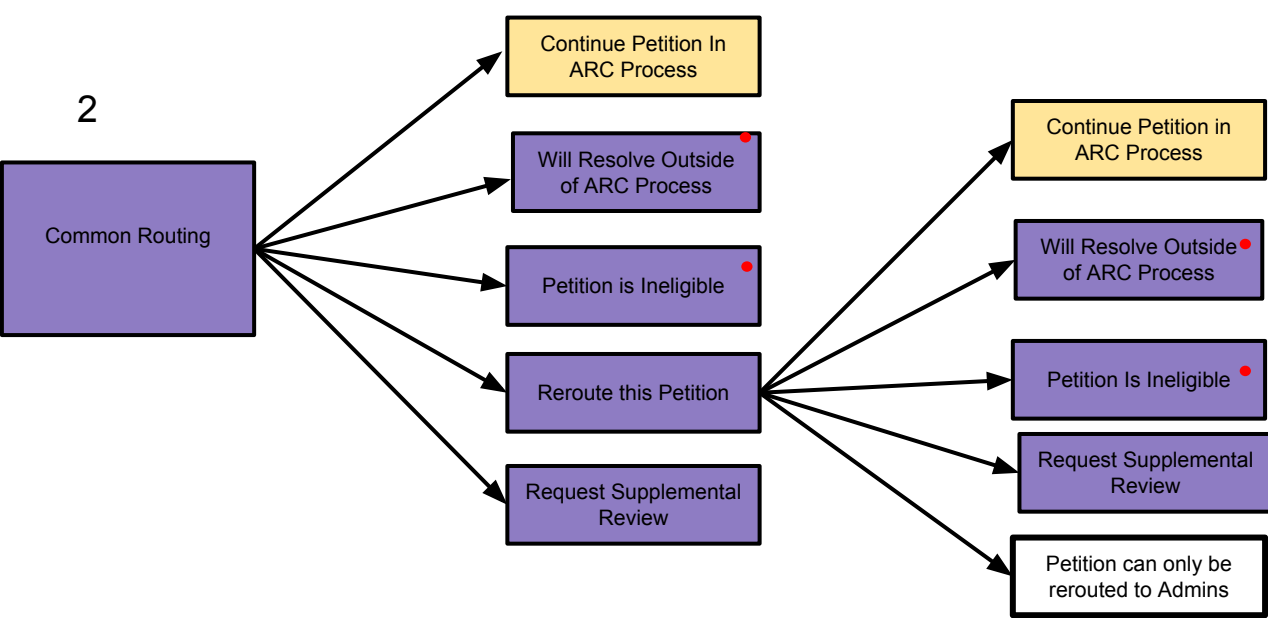
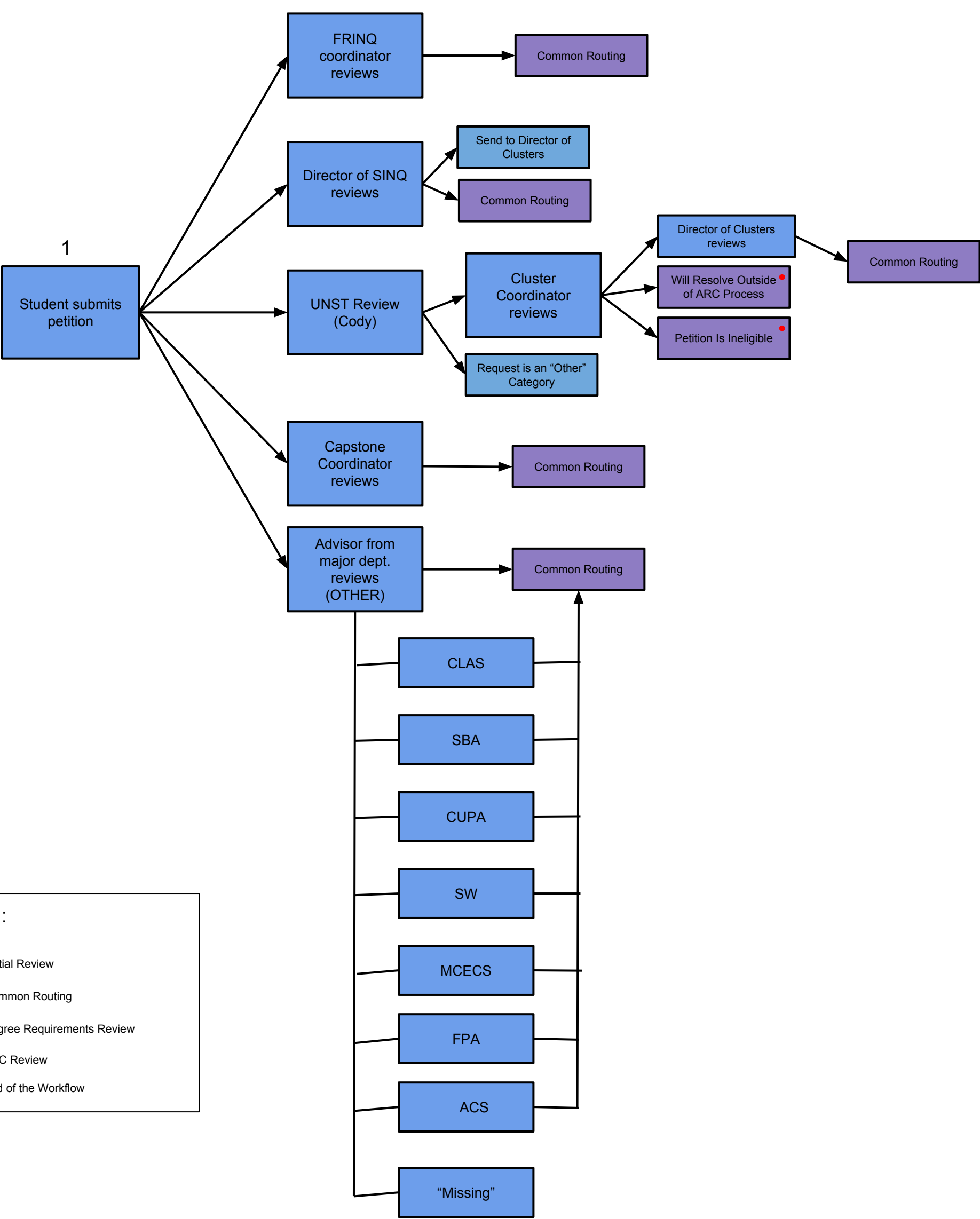
- i. This button routes the petition and your comments to the next step in [the process](#).
- b. May Resolve outside of ARC Process 
 - i. Click this button when an ARC petition is not needed or is not appropriate. Examples of this include resolving the issue by submitting a DARS exception or when another petition process is more appropriate. An email will be sent to the student with your comments.
- c. Approved based on "U to U" 
 - i. This option will automatically approve this petition
- d. Issue Cannot be Petitioned 
 - i. Use this button carefully. Click this button when the issue absolutely cannot be petitioned. The most common example of this is a student petitioning to graduate with 30 credit hours. An email will be sent to the student with your comments.
 - ii. If you are unsure whether the issue can or cannot be petitioned, do not use this option. Instead, add your comments and click the "Continue in ARC Process" button. ARC will determine if the issue is petitionable.
- e. Request Additional Review 
 - i. If you need someone else's feedback in addition to your own, use this button. This sends an email with a link to the petition to a recipient of your choice, asking for additional review. The petition will be sent to Degree Requirements once this step is complete.

If I get an email requesting feedback

If you receive an email with the subject of "Your feedback has been requested on an ARC Petition", this means your review of the petition is being requested. . An advisor or University Studies coordinator has requested your input on a petition. To provide the input, follow the steps below:

1. Click on the link in the email to open the petition. This link must be opened in Internet Explorer, Firefox, or Safari. The link will not work in Chrome.
2. Review the sections of the petition and provide your comments in the Additional Review Section 
3. Click the Save Comments button at the bottom of the page 
4. The petition will be sent to Degree Requirements once this step is complete.





Legend:

- Initial Review
- Common Routing
- Degree Requirements Review
- ARC Review
- End of the Workflow